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AUTHOR McAndrews, J. Briggs
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ABSTRACT

The development and use of a format for the self-evaluation of middle schools by local school districts is presented. Included are topical areas of study and procedures which result in increased staff development, community and school communication, a data base for continuing use by the school district and for comparative and research analysis by other educators. The paper uses a field study approach (participant observer) to analyze the case history of the format's use in a middle school during 1975-76. The case history covers the format development, the self-evaluation, and the final evaluation presentation to the Board of Education. (Author/RC)

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Dr. J. Briggs McAndrews
Assistant Superintendent
Bethlehem School District
Delmar, New York 12054
April 6, 1977

MIDDLE SCHOOL EVALUATION: FORMAT, CASE HISTORY AND PERSPECTIVE

ED138615

The Bethlehem Central Middle School is located in a suburban community of 18,000 people situated three miles southwest of Albany, New York. The school covers Grades 6 through 8, contains approximately 1,100 students and has a staff of 77 instructional and administrative personnel and 35 non-instructional personnel. The school was organized between 1965 and 1968 and opened formally in 1969. Since this time, the school has operated as an experimental organizational plan under New York State approval.

In the Fall of 1975, the Board of Education asked district administrators to develop an evaluation of the secondary program. This included the Middle School and the High School. The High School administration and faculty chose the Middle States Self-Evaluation process. The Middle School also chose to undergo a self-evaluation process but also chose to develop their own format rather than using one developed externally. This paper centers on the Middle School self-evaluation process.

In doing so, it will concentrate upon the evaluation format, a chronological case history of major events, and a perspective of the evaluation process as analyzed by a participant observer.

Format and Chronological Case History

Month I

The organizational format for the self-evaluation was to be controlled by a Steering Committee of teachers, administrators and Middle School parents. The organization of this committee was the decision of the Central Office Administrative staff (Superintendent and Assistant Superintendent).

The Steering Committee was presented with two formats for Middle School self-evaluation; one developed commercially and a second developed by a university-based School Study Council. The Steering Committee felt these did not meet the needs

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of a Middle School evaluation and asked to be presented with a format specific to two large areas of evaluation:

1. Topical areas of interest or areas unique to a Middle School organization
2. Areas of curriculum offerings

The topical areas were developed by the Assistant Superintendent for presentation to the Steering Committee. The areas chosen for study were:

1. Middle School vs. Junior High School
   - A. Background of Middle School development in Bethlehem
     1. Development
     2. Community characteristics of Bethlehem as related to the school
   - B. Definition of differences between Middle School and Junior High
     1. Philosophy
     2. Objectives and functions
     3. Staffing
     4. Student grouping and needs
     5. Schedules
     6. Curricular offerings
     7. Plant
   - C. Survey of student, staff and community attitudes concerning Middle School and Junior High - aimed at determining areas in need of definition
   - D. Studies of recent trends in New York State
   - E. Studies of objective data
     1. Achievement trends in comparable Middle School and Junior High Schools
     2. Studies of affective data in Bethlehem vs. other Middle Schools (PA and NY)
2. Middle School Schedules
   - A. Study of background and development of present Middle School schedule
     1. Historical - 1969-75
     2. Scheduling process each year
   - B. Review of literature concerning Middle School schedules
   - C. Review of schedules in selected Middle Schools in New York and other states
   - D. Development of alternative schedules and simulation of these schedules

3. *Team Teaching*

A. *History of present team arrangement and practices*

B. *Research summary on team teaching literature*

C. *Review of alternatives to present teaming*

1. *Non-teaming vs. present teaming*
2. *Math-Science, English-Social Studies teams, etc.*
3. *Full schedule teams*
4. *Alternative teams*
5. *Aides vs. teachers on teams*

D. *Support services to teams*

E. *Team size - students/teacher/student teacher/aides*

F. *Team autonomy and objective development, team goal setting*

G. *Present team selection process*

H. *Degree of interdisciplinary nature of teams*

4. *Staffing*

A. *Teaching qualifications of present staff vs. suggested in literature and in other New York Middle Schools*

B. *Staffing in various areas, e.g., curricular areas, student services, administration*

C. *Pupil/teacher ratios in Bethlehem vs. other New York Middle Schools*

D. *Alternatives to present staffing organization - simulations of*

1. *School within schools*
2. *Across grade level units*

5. *Administrative Organization*

A. *Survey of leadership opinions - student, staff, community-based on functions of positions*

B. *Department Chairman - Supervisor organizational pattern*

C. *Leadership areas*

1. *Curriculum*
2. *Instruction*
3. *Finances*
4. *Staffing*
5. *In-service*

6. *Educational Environment*

   A. *School plant and facilities*

   B. *Organizational climate*

   C. *Student, staff surveys to provide baseline data on student and staff affective responses to environmental checklist developed by study group*

   D. *Development of recommendations to enhance environmental aspects*

7. *Student Grouping Practices*

   A. *Heterogeneous vs. Homogeneous literature*

   B. *Current Bethlehem Central Middle School practices by team*

   C. *Current Middle School practices in New York*

   D. *Simulations of variable groupings available*

8. *Learning Styles - Instructional Styles*

   A. *Present teaching practices*

   B. *Identification and survey of student learning styles*

   C. *Recommendations for learning - instructional style matching*

9. *Special Programs for Middle School students*

   A. *Range of extra-curricular activities and level of student participation*

   B. *Student governance in the Middle School*

   C. *Current practices in other Middle Schools*

   D. *Philosophy of special programs for Middle School students*

10. *Articulation*

   A. *Perceptions of Elementary, Middle School, and High School staff*

   B. *Perceptions of selected student groups*

   C. *Student and parent interviews*

   D. *Review of transition activities and procedures*

   E. *Record-keeping needs*

   F. *Across-schools communication processes*

   G. *Involvement of various groups (students, parents, teachers, administrators, counselors) in transition processes*

   H. *Curricular articulation*

   I. *Learning style articulation*

   J. *Teacher methodology articulation*

Areas of program offerings were classified by general category of offering and then by discipline. These were:

1. *Academic Areas*

   A. *English*
   B. *Mathematics*
   C. *Science*
   D. *Social Studies*

2. *Exploratory Arts (Exploratory Offerings)*

   A. *Art*
   B. *Foreign Languages*
   C. *Health*
   D. *Home Economics*
   E. *Industrial Arts*
   F. *Integrated Arts (a coordinated aesthetics offering)*
   G. *Music*
   H. *Typing*

3. *Physical Education*

4. *Support Services*

   A. *Guidance services*
   B. *Handicapped services for mainstreamed students*
   C. *Library-media services*
   D. *Remedial Reading*

The parent members of the Steering Committee were those most aggressive in the development of the topical areas; teaching staff was the group most defensive. Conversely, the teacher group was most aggressive in including the disciplines for study; the parent group was the most passive.

Upon Steering Committee selection of the format for the self-evaluation, Middle School teachers were asked to list the topical area study committees on which they wished to participate. Each teacher chose three topical areas and listed these in order of preference. The Steering Committee then placed teachers on topical area study committees, selected chairpeople and co-chairpeople for the study committees and developed the calendar for completion of the self-evaluation. The teacher group was most aggressive in placement of teaching staff on the study committees and for extending completion date while the parent group was passive on teacher assignment but active in seeking an early completion date.

Teachers were placed upon program study committees according to their teaching discipline. These committees were lead by the supervisory personnel of their department. If no supervisory personnel existed, the Steering Committee assigned the chair.

Month 2

Committee chairpeople (topical and disciplines) were provided a two-hour workshop devoted to:

1. Discussions of each study area and a preliminary listing of topics or questions relevant for study in each area
2. Listing of resources available, e.g., ERIC documents, university consultants, State Education Department personnel, outside districts, etc.
3. A reporting process for problems, progress, resource needs, etc. This process was chairpeople to Assistant Superintendent to Steering Committee
4. Motivation of chairpeople

Public announcements through the District Newsletter and flyers sent home with Middle School students requested volunteer participants for all study committees. A listing of meeting dates, both after school and during half-day dismissal working sessions, was included. Approximately 50 volunteers were secured with their committee preferences. Assignments were made by the Steering Committee without any particular Steering Committee subgroup being most dominant in this assignment process.

At the end of Month 2, the first half-day work session was held. Topical area study groups met first; staff and volunteers then rotated into discipline study groups for the last half of the work session. These work sessions were primarily introductory and housekeeping in nature but also resulted in requests for information specific to many topical areas. Requests were primarily in the area of printed publications listings to be secured through the ERIC system.

Months 2 and 3

During this period, each month contained an after school one-hour work session and a half-day dismissal work session. It was at this point that the earlier level of interest and desire to provide information for major changes waned. Evidence of this occurred in the form of:

1. *Increased frustration on the part of chairpeople in their ability to coordinate information into the study groups and to gain information they felt pertinent to the topic. Most felt a need for information directly related to their Middle School rather than general printed matter*

2. *Increased requests on the part of teaching staff for an extension of the final reporting date for the self-evaluation*

3. *Study Committee volunteers missing work sessions*

4. *Increased requests from Study Committees to the Assistant Superintendent for new ideas and topics*

During the third month, the Steering Committee requested the Assistant Superintendent to develop survey instruments which would be administered to community, staff, students and parent groups. These surveys were to provide specific information to Study Committees.

Month 4

Surveys were developed by the Assistant Superintendent working through the Study Committees. During this month the topical area Study Committees developed or reacted to survey materials; the subject discipline committees continued to work within their respective curricular areas.

Surveys developed and the clientele they surveyed were:

1. *Community survey - this mailed survey was sent to each 20th taxpayer in the district (350) and every third Middle School parent (350). Staff also completed the survey. The survey covered the areas of:*

   A. *General perceptions concerning the Middle School*

   B. *Goals of a Middle School*

   C. *Staff effectiveness*

   D. *Recent changes*

   E. *Teaching techniques and curricular areas*

   F. *Student pressures, interpersonal relationships, discipline*

   G. *Guidance Department*

2. *Student Opinion Inventory - asked one-third of the Middle School students their opinions of school rules, staff, curriculum, extra-curricular activities, pressures and interpersonal relationships and changes they wish to see occur in the future*

3. *Methods I Use To Learn - a series of questions used to determine student learning processes and teacher instructional processes as seen by students in each discipline. One-third of the Middle School students completed this survey*

4. *Articulation Survey - asked students in Grade 5 (elementary), Grade 9 (High School), and Grades 6 and 8 (Middle School) about the transition process between elementary and Middle School and between Middle School and High School. Given to one-third of students in above grades*

Surveys were distributed, collected and tabulated (key punch and computer analysis) during Month 4 and provided to all study committees at the beginning of Month 5.

Month 5

All topical area study committees studied the results of the surveys to determine if the results impacted their studies. At the end of this month, which included a half-day work session and an after school work session, the Steering Committee received reports of progress from each of the chairpeople. The Steering Committee also decided that the final evaluative reports would be submitted at the end of Month 7 and presented to the faculty during Month 8. Lastly, the Steering Committee decided that the final report of the evaluation be compiled by a small group of staff and parents. In this way the total report would coordinate the individual committee reports; decisions would also be made to delete or emphasize various recommendations made by the study committees.

The final reports of the study committees were to include strengths, weakness and recommendations for change.

Months 6 and 7

During each of these months, a half-day work session and an afternoon work session occurred. During Month 6 meetings, survey results continued to be major topics of discussion. Study group chairpeople also delegated final topics to group members to complete. This work session also included a listing of identified strengths, weaknesses and recommendations which would be refined at the next meeting.

During Month 7 meetings the final strengths, weaknesses and recommendations were completed by study groups and submitted to the Steering Committee for review. The Steering Committee recommended these be presented to the entire faculty and then reviewed and put into a final report by the smaller committee entitled Final Evaluation Report Committee.

Month 8

Study group chairpeople presented, in a faculty meeting forum, their final reports to the faculty. The session was for reporting only, copies of the final reports were made available to the faculty in various areas (library, faculty room, department offices). All faculty were urged to read the final reports and respond in written form before the end of Month 8 if there were areas of disagreement. To this, the study group chairpeople would respond in written form. These responses were then provided to the Final Evaluation Report Committee.

Month 9

The Final Evaluation Report Committee met for three full days of workshops to:

1. *Review all submitted evaluations*
2. *Compile the final evaluation report*
3. *Determine the format for presentation of the report to the Board of Education and community*

This group was composed of the Assistant Superintendent, six teachers and one parent. The group decided to break into subcommittees, work on selected reports and then report back to the total group. This process took the first day of the workshop.

At the end of the first day of the workshop, the group felt separate reports should emanate from the surveys done during the self-evaluation process. The second day was spent reviewing the four major surveys and reporting the strengths, weaknesses and recommendations which the group felt these opinion surveys portrayed. This was a major expenditure of energy, but was necessitated by the group's feeling that the surveys had valuable information which had not been systematically reviewed and culled by the earlier study groups.

Day three was spent in the development of a reporting format for public presentation. At this point, the teacher representatives articulated a concern that the report lacked substance or change orientation and was not a representative product of the staff. They decided to attach a "Statement of Concern" to the final evaluation report.

A self-evaluation of this nature provides for direct interaction by a number of power groups within the school district. Identifiable power groups which affected the self-evaluation process included:

1. *The Board of Education*
2. *The Administration in the form of the Assistant Superintendent (Central Office) and the Middle School Principal*
3. *The teaching faculty. The divisions of this group into subgroups exercising power occurred specific to the task being undertaken, i.e., the Steering Committee subgroup, the formation of subgroups within topical area study groups, etc.*
4. *The parent volunteers*

The Board of Education exercised power through the legitimizing and rule setting processes. The Board determined that the self-evaluation would occur, determined the final reporting dates, the amount of released time available to study groups and the amount of resources available for consultants and information searches. As the teacher group desired the self-evaluation to be an exercise in equal decision-making, the bureaucratic orientation taken by the Board proved increasingly frustrating.

The administrators exercised control through a negotiating process. They controlled access to the Board and to the time and money resources; the teachers controlled the motivational process. Administrators were able to trade expertise in the evaluative process and/or time and money resources for teacher group commitments to task completion.

The teacher group originally controlled the study progress in a passive manner, e.g., "tell me what to do and I'll complete it". The predominate type of later control, and that exercised most effectively, was in the placement of special interest teachers on study groups. An example occurred on the Scheduling Study Group. Exploratory Arts (Art, Music, Industrial Arts, Home Economics) teachers dominated this study group and, in doing so, made schedule recommendations which would provide increased student time in Exploratory Arts and extra-curricular activities and decreased time in academic subjects. Similar power groups formed on Team Teaching, Staffing, Administrative

Organization, Middle School vs. Junior High School, and Grouping Study Groups. The Environment Learning Styles - Instructional Styles, and Articulation Study Groups were free of such power groups forming.

The final exercise of power by the teacher group was the decision to attach the "Statement of Concern" to the Final Evaluation Report. The teachers manifest function in attaching this statement was to request increased equality in the decision-making process. The latent function was to absolve the teaching staff from weaknesses in the report and to place the blame for weaknesses or unpopular recommendations upon the Board of Education.

The parent group was able only to exercise persuasive power. On all study groups, the number of parent volunteers was smaller than the number of staff persons, their expertise in the educational area presented difficulties in their understanding many topics, and their attendance became sporadic. Basically, the parent group provided a legitimizing function to the study process; input from the surveys caused more changes of opinion than did parent involvement on study groups.

Constraints to this type of evaluation are numerous. Chief among these were:

1. Time - This study was not commissioned until November, 1975, did not begin in earnest until January 1976 as much preparatory work and meeting was necessary for study development. With (6) half-day sessions available between January and June, staff and volunteers had to complete the study and make recommendations. The time constraints also exacerbated a number of the following problems:

2. Variable groups and diverse input - Teaching staff from a variety of departments and a variety of volunteers with differing degrees of knowledge and interest about the Middle School were working together in evaluative groups. While this tended to increase communication channels, the time necessary to explain and discuss various aspects of the evaluation was also increased.

3. Materials available for use in the study - Middle School self-evaluation materials are not widely available in tested form. Also, a number of study group areas were totally new topics for which materials had to be gathered and developed. Therefore,

the guideline materials did tend to provide narrow parameters for study and lessened the prospect of wide-ranging ideas and subjects being discussed and recommendations being generated.

4. *General Skepticism and timing of the study - The evaluation was commissioned by the Board of Education without staff request or participation. Particularly at the beginning of the evaluation, the staff was very skeptical about the reasons for the evaluation, the need for staff time to be used in this manner, and the extent to which staff ideas and recommendations would be accepted or considered. Secondly, the evaluative process took place during the budget development period. During the past three budget development periods, the Middle School staff has percieved their staffing and program patterns to be the most seriously cut into by budget and the Middle School organization the most closely questioned in terms of its purpose and consequences in offering programs to youngsters. For this reason, the staff felt an inherent reluctance to offer recommendations which could affect the present program and staffing status through redefinition of programs or reorganization of the educational components (e.g., teams, supervisory and administrative structures, support services). There was a basic concern that the recommendations which came out of the survey would be used against the staff rather than providing a forum for cooperative discussion and decision-making.*

5. *The expected follow-through or use of the evaluation was never defined by the Board of Education - Would staff input be requested in the final decision-making process? Would the material be used to develop long-range priority plans for the Middle School to which budgetary consideration would be given or would the opposite process take place? What range of ideas or recommendations would the Board be willing to consider? What way did the Board plan to respond to the evaluation?*

6. *Climate of the community, district and school - There was a general feeling that the climate of the community, the district and the Middle School did not foster the proper discussion of progressive educational ideas. Staff felt a lack of acceptance and freedom to discuss new ideas and alternative arrangements. A number of causative factors, some of which were:*

A. *The economic and budgetary problems of the present time*

B. *The level of bureaucratic orientation in the school and district*

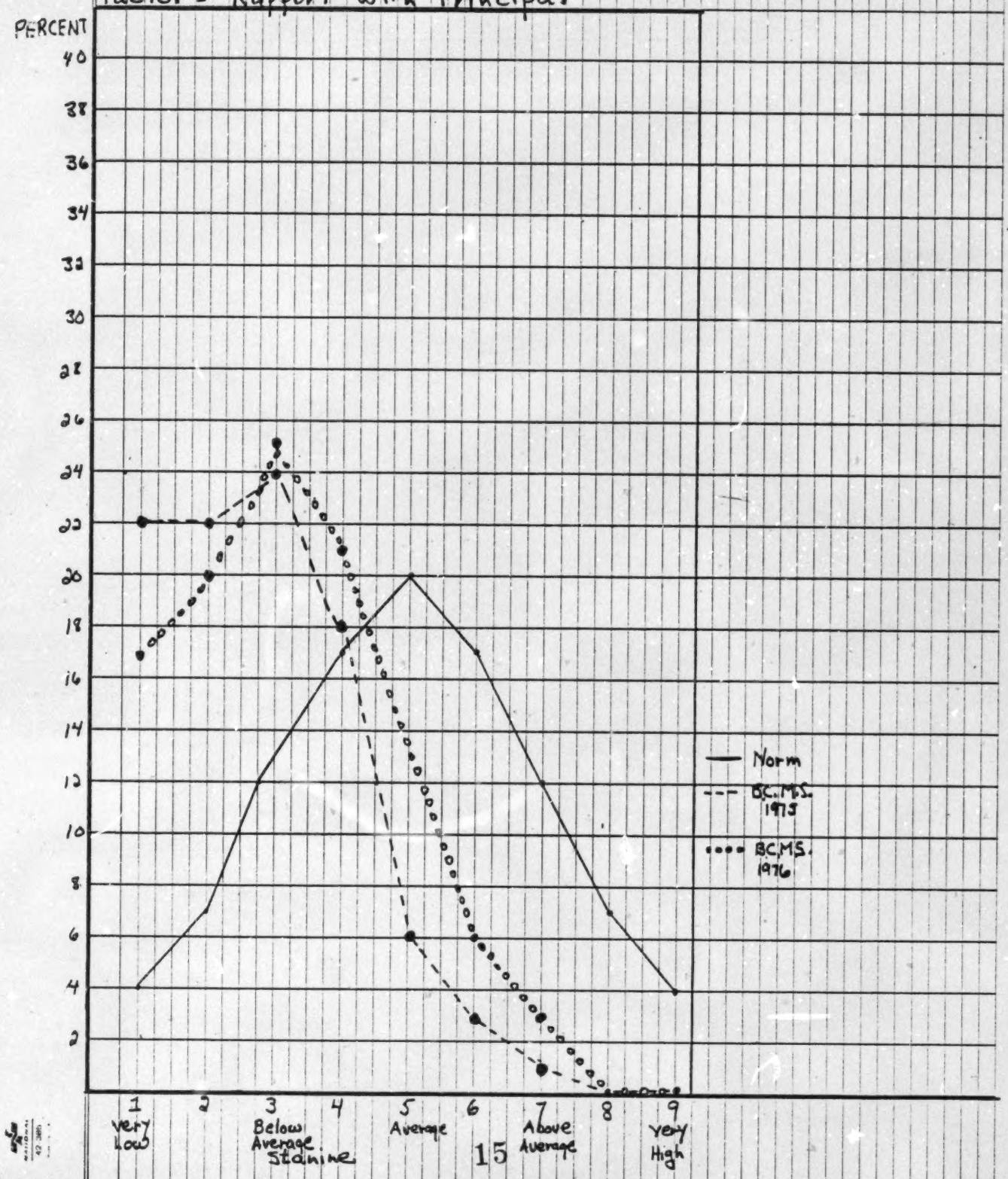
C. *The teacher vs. district attitude of negotiations*

D. *The low job-security, high self-and-colleague preservation concern within the total staff*

On the other hand, major objectives of self-evaluations within a district are to increase the communication channels available, to increase the participation in decisions, to increase staff knowledge about the organization, and, ultimately, to increase staff satisfaction and morale. To measure changes in staff morale, Middle School teachers were asked to complete the Purdue Teacher Opinionaire one month prior to the self-evaluation and one month after the presentation of the final report. This instrument contains ten factors associated with teacher morale and a total morale score.

Appendix A graphically portrays the results of these pre and post response sessions. Generally, the results of the two surveys show a positive drift in morale. It should be noted that, in this case, the drift is toward the mean from a negative first survey result. Nevertheless, this movement provides evidence of the achievement of a major objective held by districts which institute self-evaluative type school evaluations.

APPENDIX A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BC.MS. 1976
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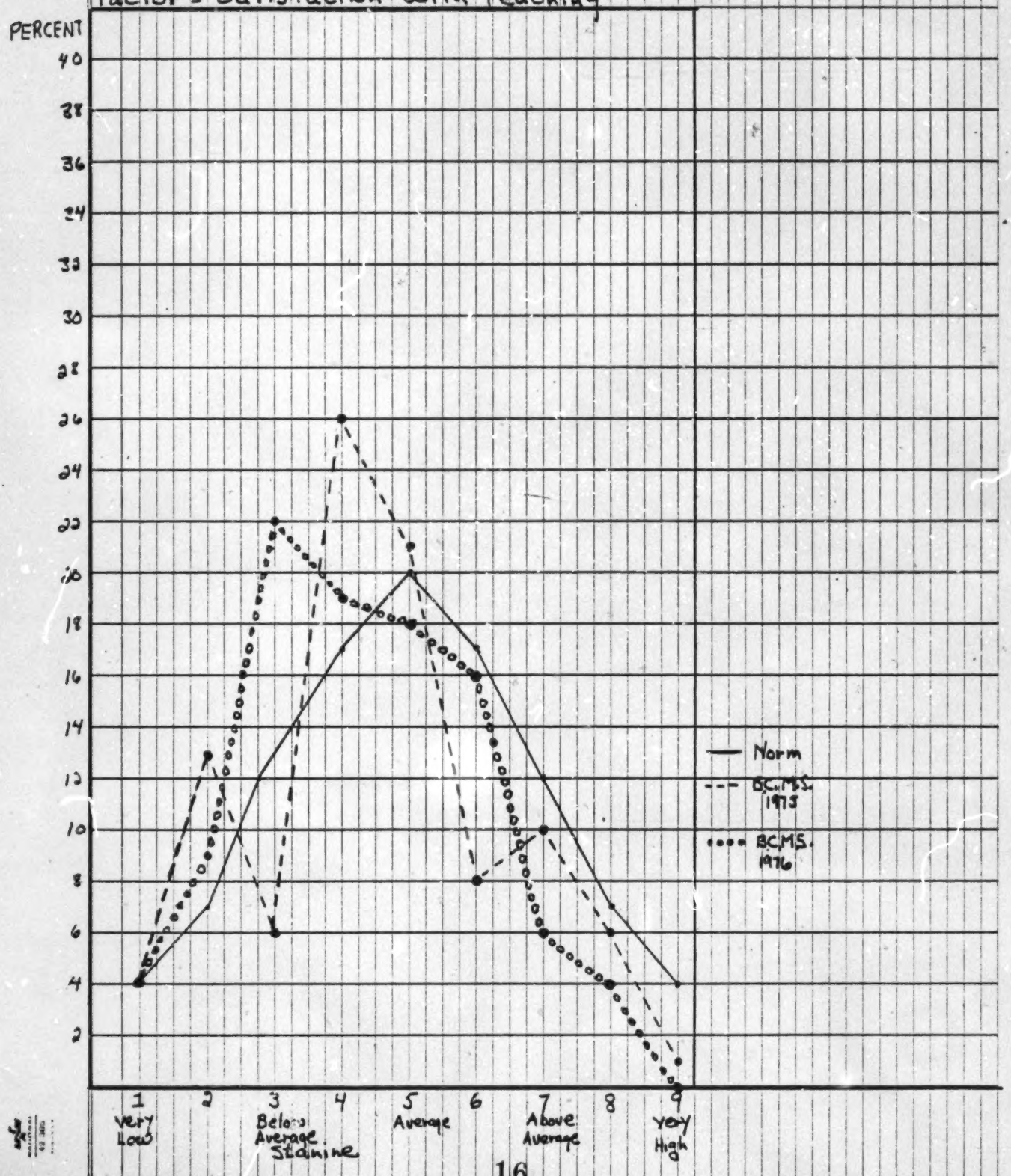
APPENDIX A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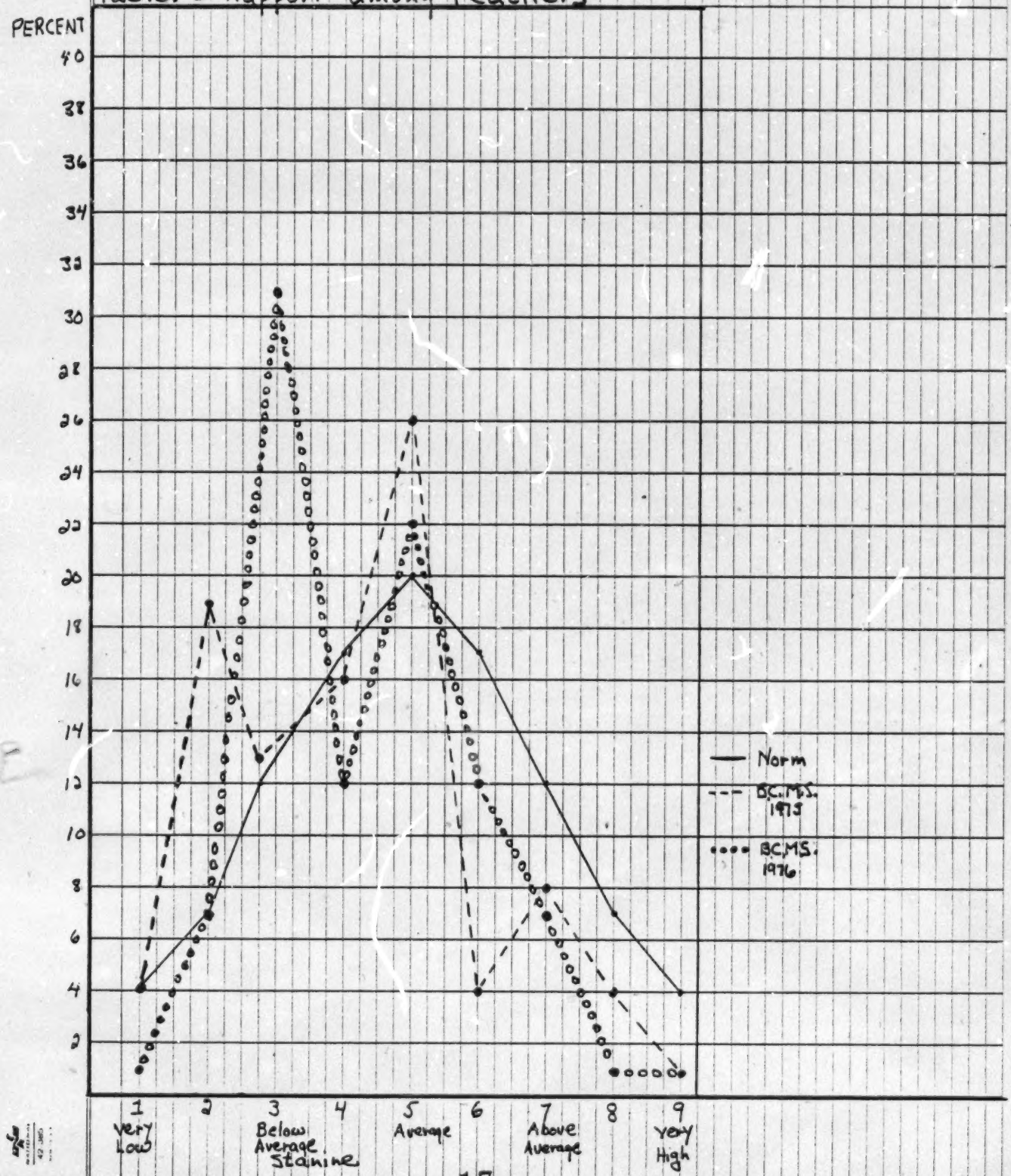
B.C.M.S. 1973
B.C.M.S. 1976

APPENDIX A

Factor = Rapport among Teachers



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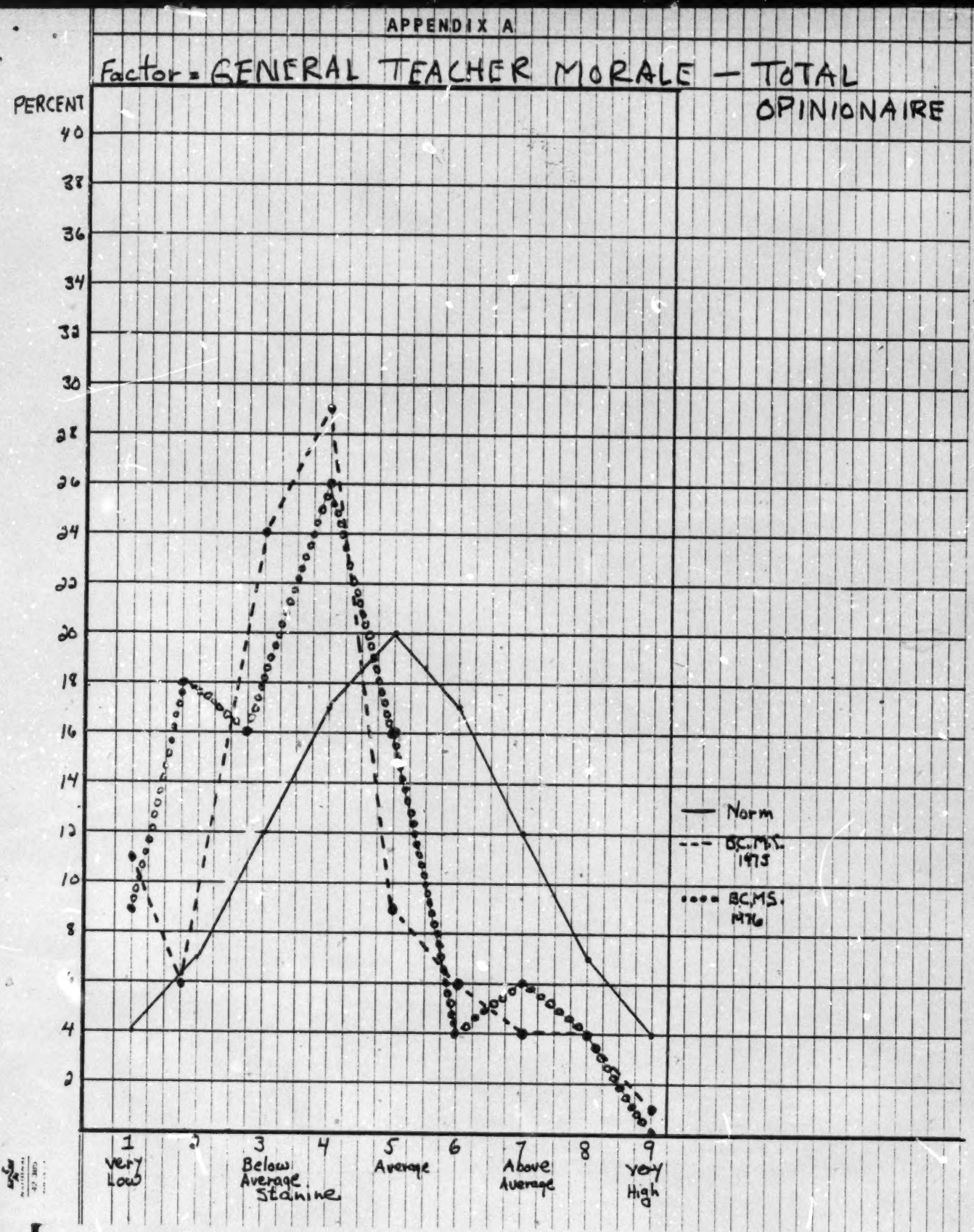
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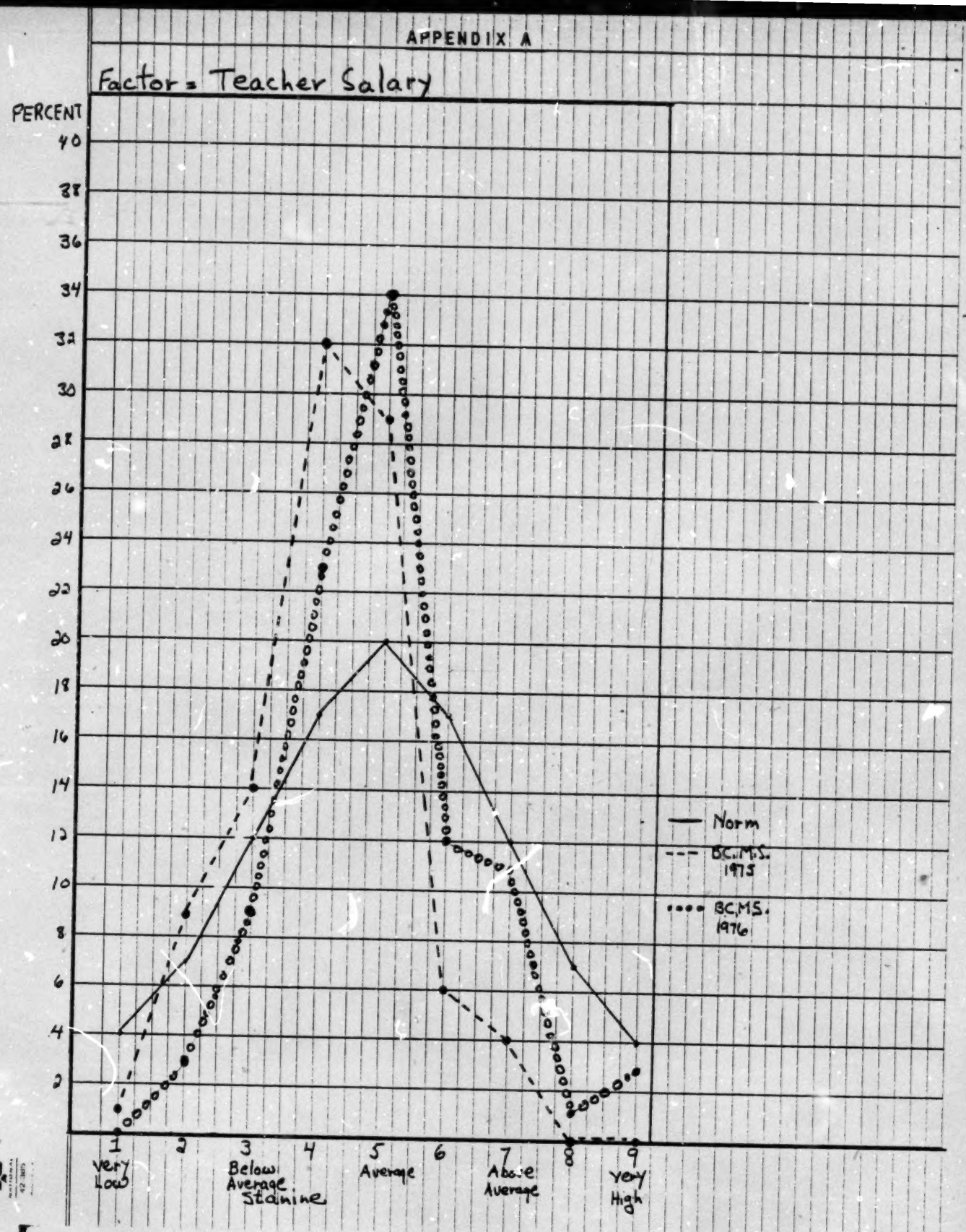
APPENDIX A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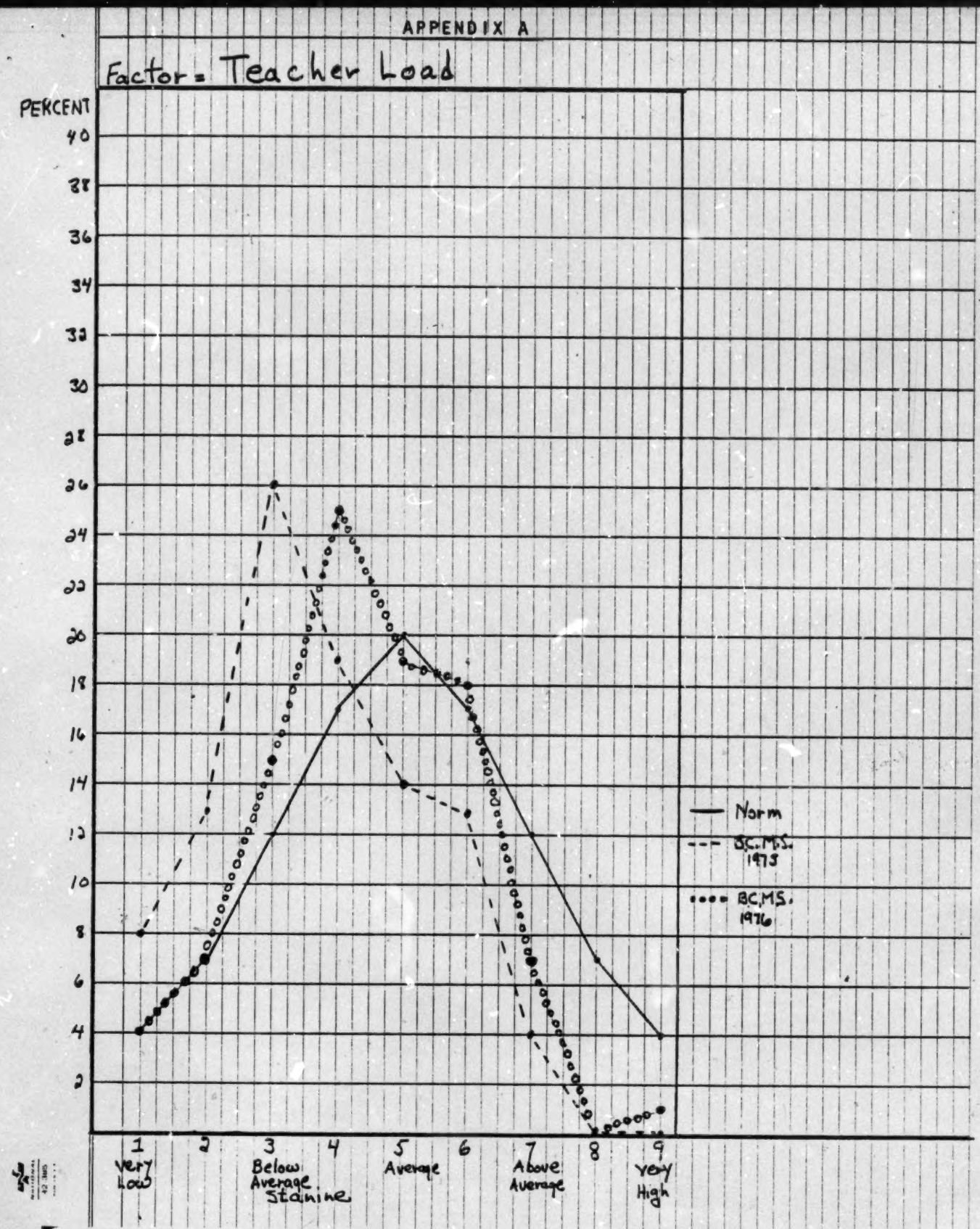
APPENDIX A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9 Very High
Stanine
Norm
S.C.M.S. 1975
B.C.M.S. 1976

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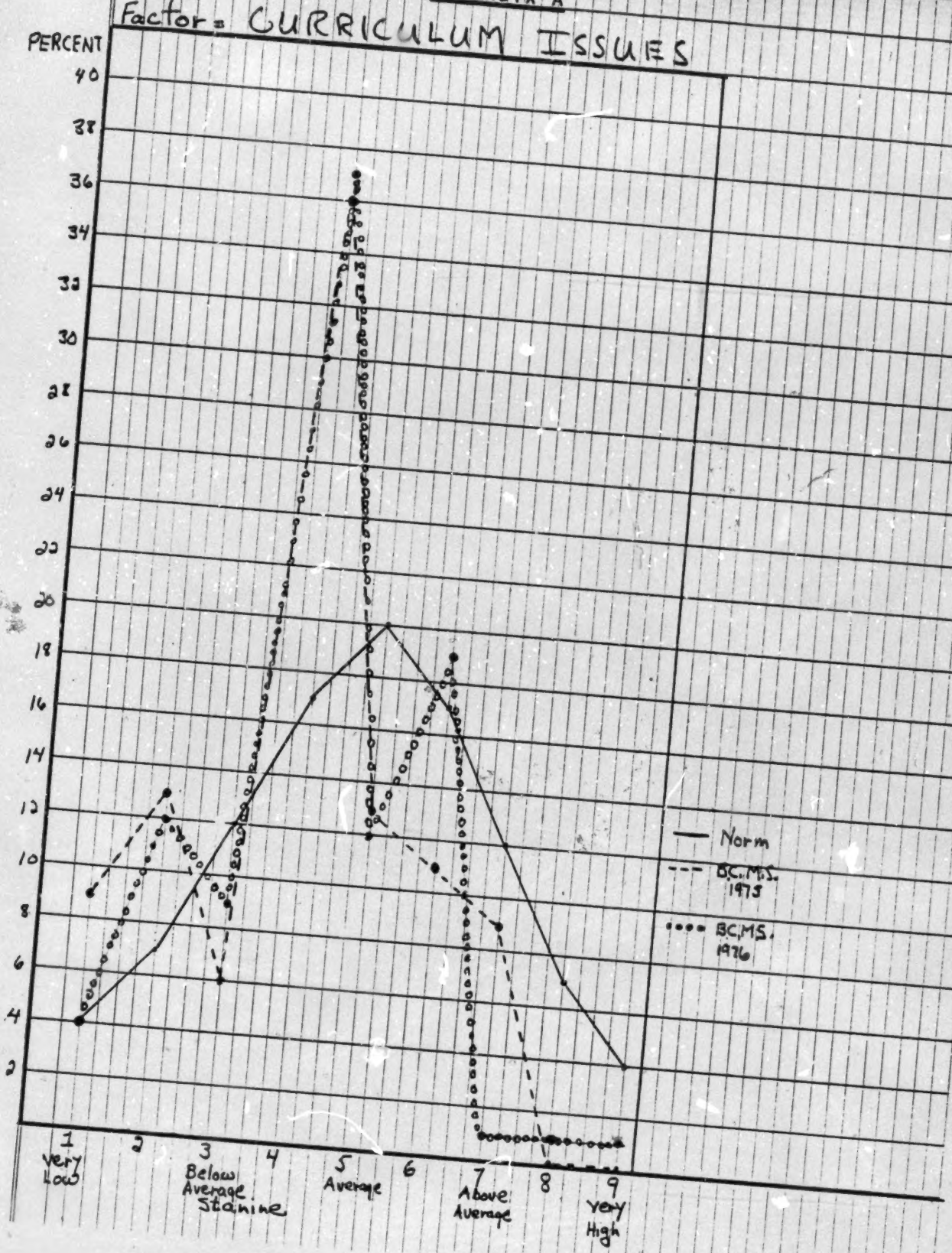
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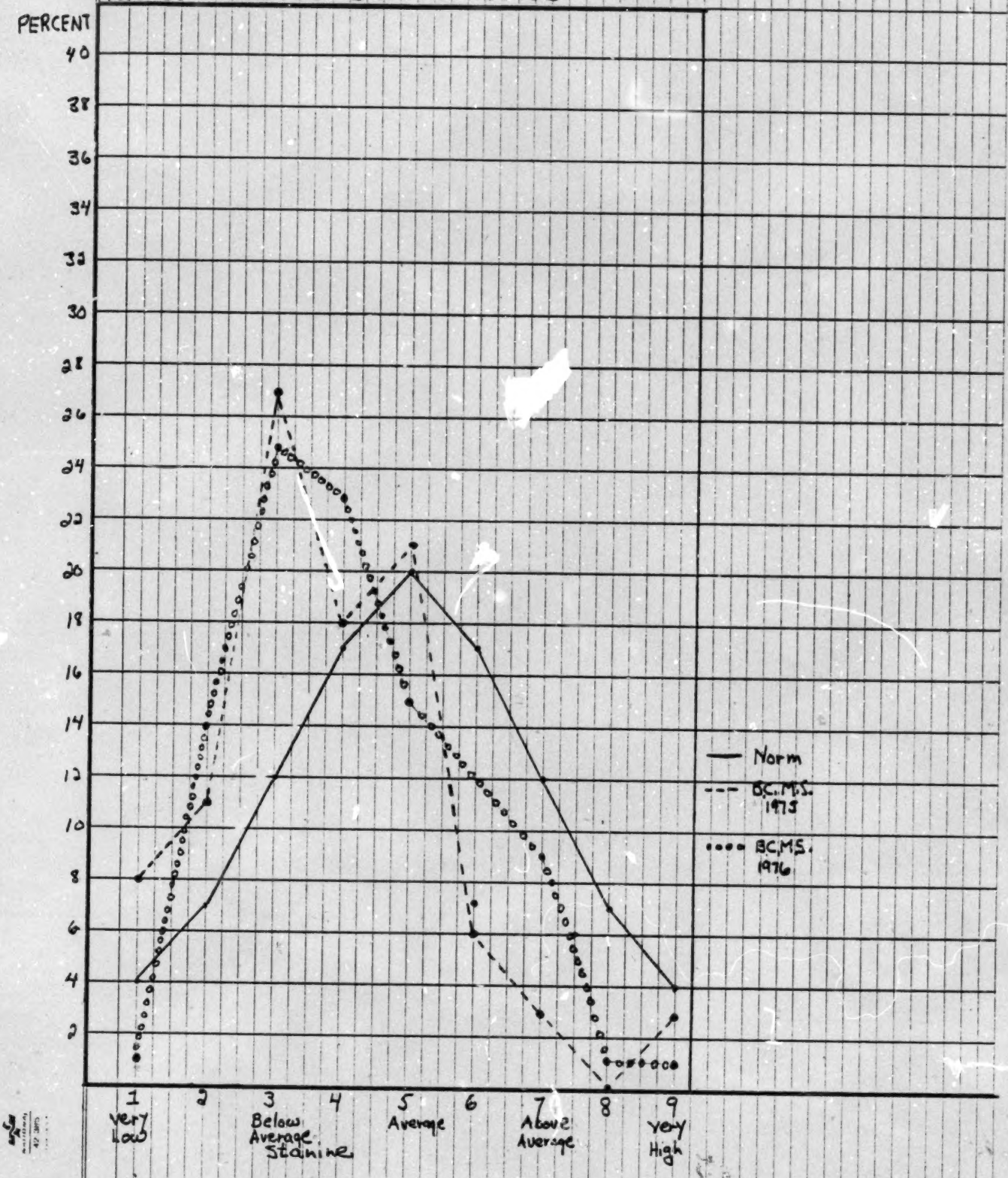
Stanine
Norm
B.C.M.S. 1975
B.C.M.S. 1976

APPENDIX A

Factor = TEACHER STATUS



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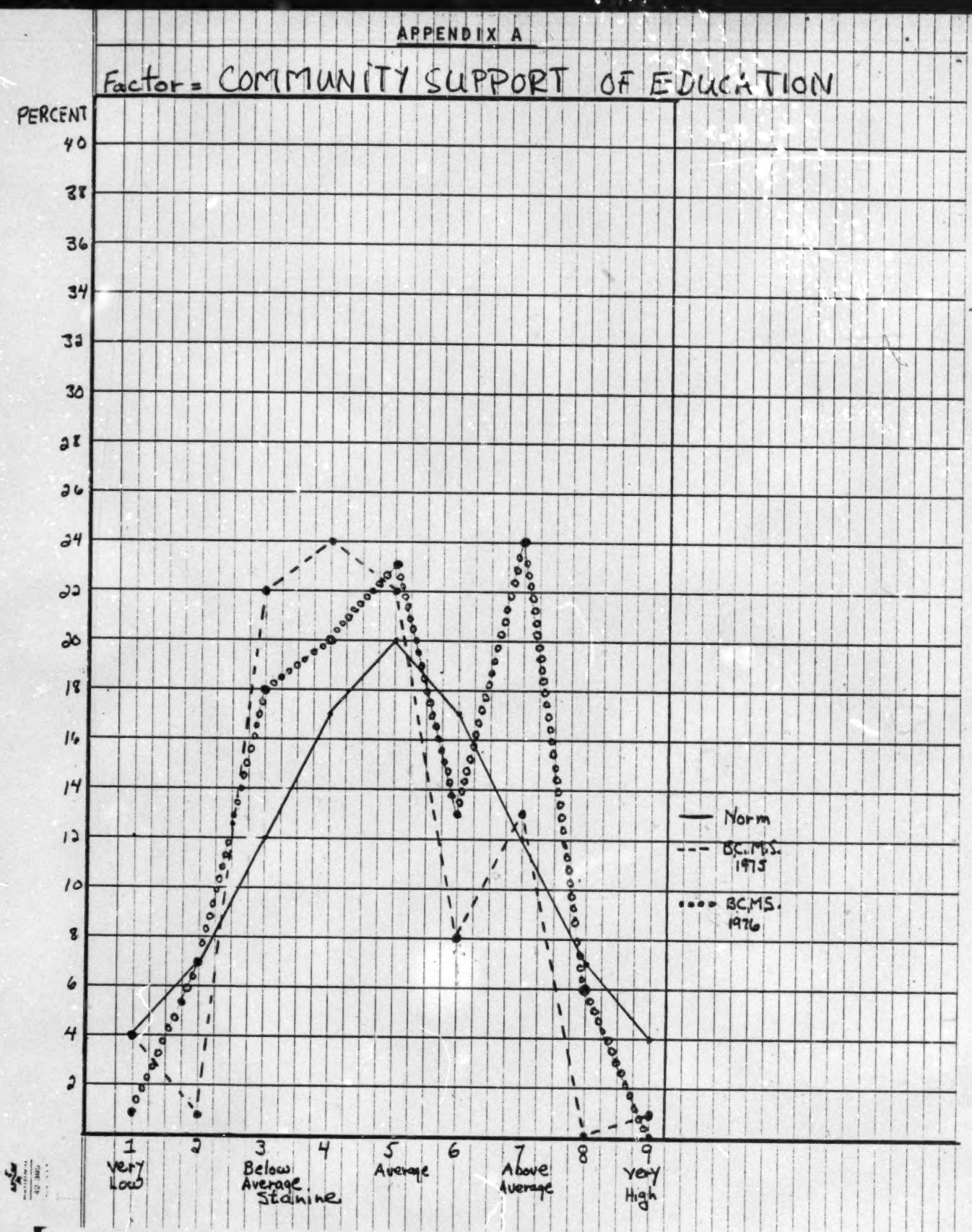
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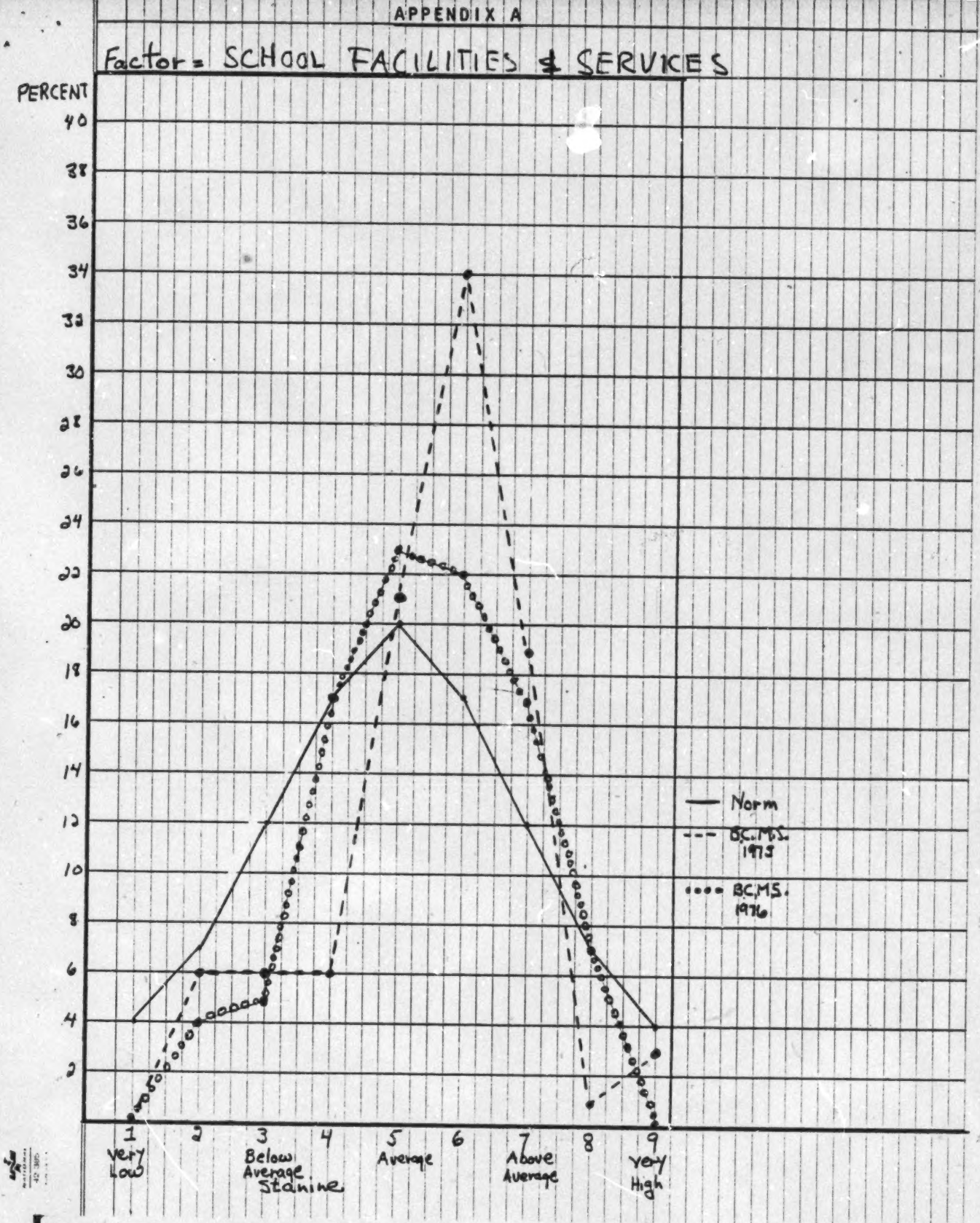
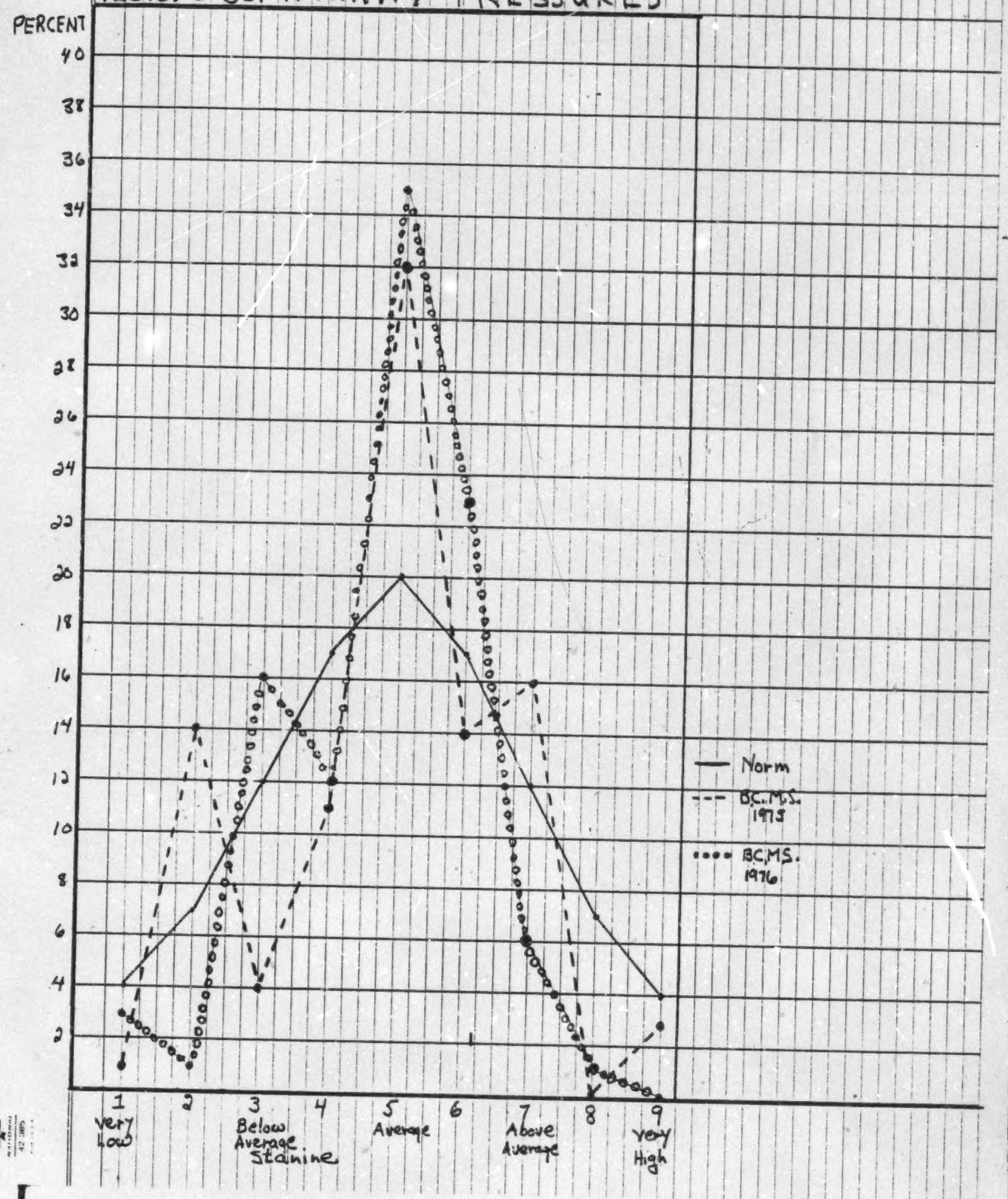
Stanine
Norm
B.C.M.S. 1975
B.C.M.S. 1976

APPENDIX A


Factor = SCHOOL FACILITIES & SERVICES
PERCENT
40
38
36
34
32
30
28
26
24
22
20
18
16
14
12
10
8
6
4
2
Norm
B.C.M.S. 1975
B.C.M.S. 1976
1
2
3
4
5
6
7
8
9
Very Low
Below Average
Stanine
Average
Above Average
Very High

APPENDIX A


Factor = COMMUNITY PRESSURES
PERCENT
40
38
36
34
32
30
28
26
24
22
20
18
16
14
12
10
8
6
4
2
1 Very Low
2
3 Below Average
4
5 Average
6
7 Above Average
8
9 Very High
Stanine
Norm
B.C.M.S. 1973
B.C.M.S. 1976